Brian Bevan is a CERTIFIED FINANCIAL PLANNER™ and has his portfolio manager designation. Beyond putting his clients' money to work for them, he wants every client to be prepared for the inevitable time when something unexpected happens in life. He strives to prepare them, their spouse/partner, kids, family, and business for those financially important life events.

Sharon Stout
Portfolio Manager
Financial Advisor
Sharon Stout's 15 years of industry experience gives her insight and temperance that only comes from time in the trenches. Because of her eye for detail, her strengths include utilization of current technology and tools for financial planning, portfolio stress testing, portfolio evaluation, and portfolio analysis. She has her portfolio manager designation. The most important elements she provides to her clients are enthusiasm, empathy, compassion, and energy; because she truly cares about each of her clients personally.

Steve Yaworsky
Financial Advisor
Steve Yaworsky is a life-long devotee of the financial industry and its markets. He graduated with a BS in Economics from the University of Utah. He then began his career on the floor of the Chicago Mercantile Exchange. This gives him strong experience and insight into the important commodities and options arenas. This experience is combined with his tenure as a licensed insurance professional in Park City, Utah. Working with the builder/developer and realtor community for over a decade gives him a perspective that rounds out the team dynamic.

Bart HIner
Portfolio Manager
Financial Advisor

Bart Hiner has a true passion for creating and monitoring portfolios. He believes that investor’s assets should be diversified, as do most financial advisors. One difference that Bart brings to his investment strategy is that he does not believe in diversification to the point of dilution, or for the sake of diversification alone. Bart likes portfolios to be defensive, tactical, and opportunistic.